

U.S. Department of Transportation

DELPHI Education

*Quick Reference Guide to
Oracle Applications
Basic Navigation*



START UP

Logging On

1. Enter the user name in the **User Name** field.
2. Enter the password in the **Password** field.
3. Select the **Connect** button.



PROD html updated: 01/03/2002
Not used Ili on your computer yet? [Click Here](#)

User Name

Password

*****WARNING***WARNING***WARNING*****

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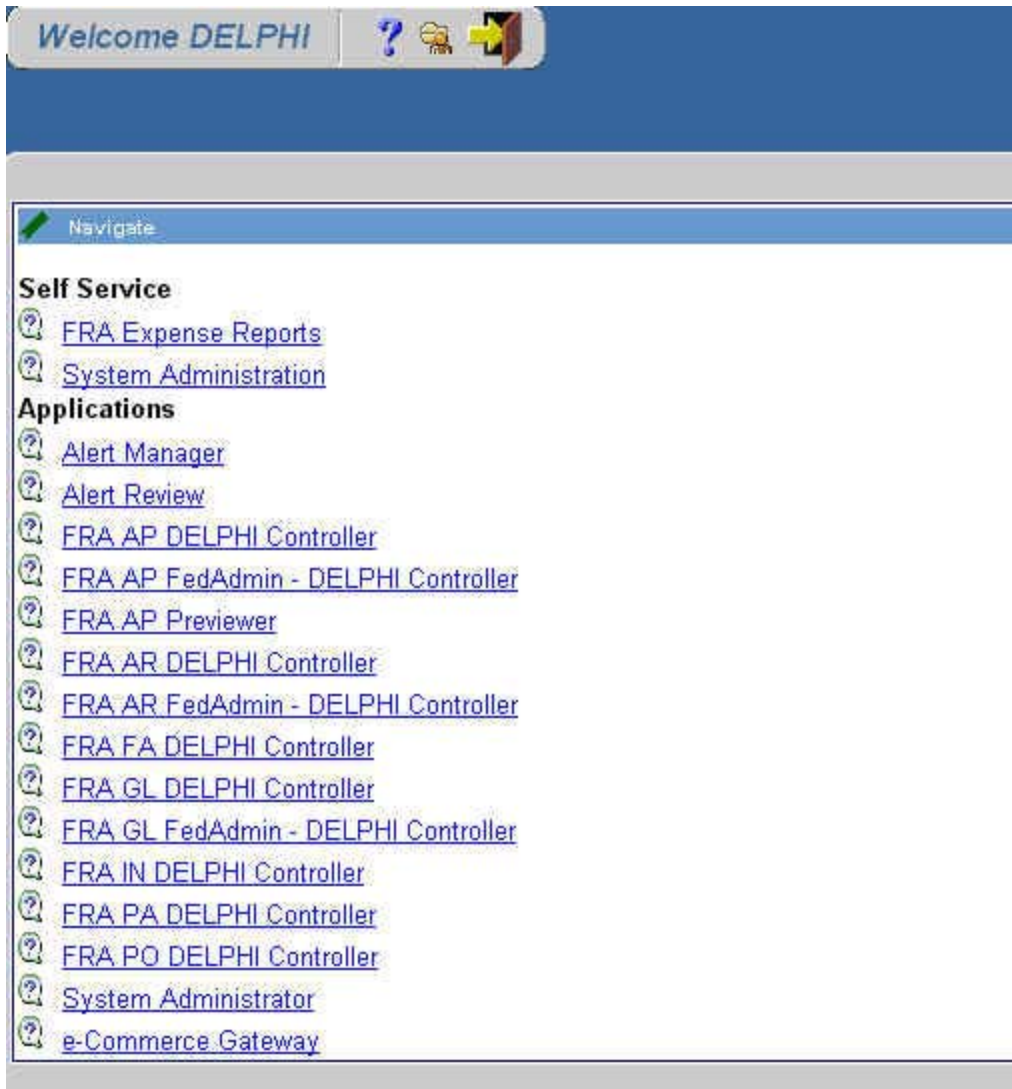
USE OF THIS SYSTEM BY ANY USER, AUTHORIZED OR UNAUTHORIZED, CONSTITUTES CONSENT TO THIS MONITORING, INTERCEPTION, RECORDING, READING, COPYING, OR CAPTURING and DISCLOSURE.

Oracle Applications Sign-on Form

CHOOSING A RESPONSIBILITY

Choosing a Responsibility

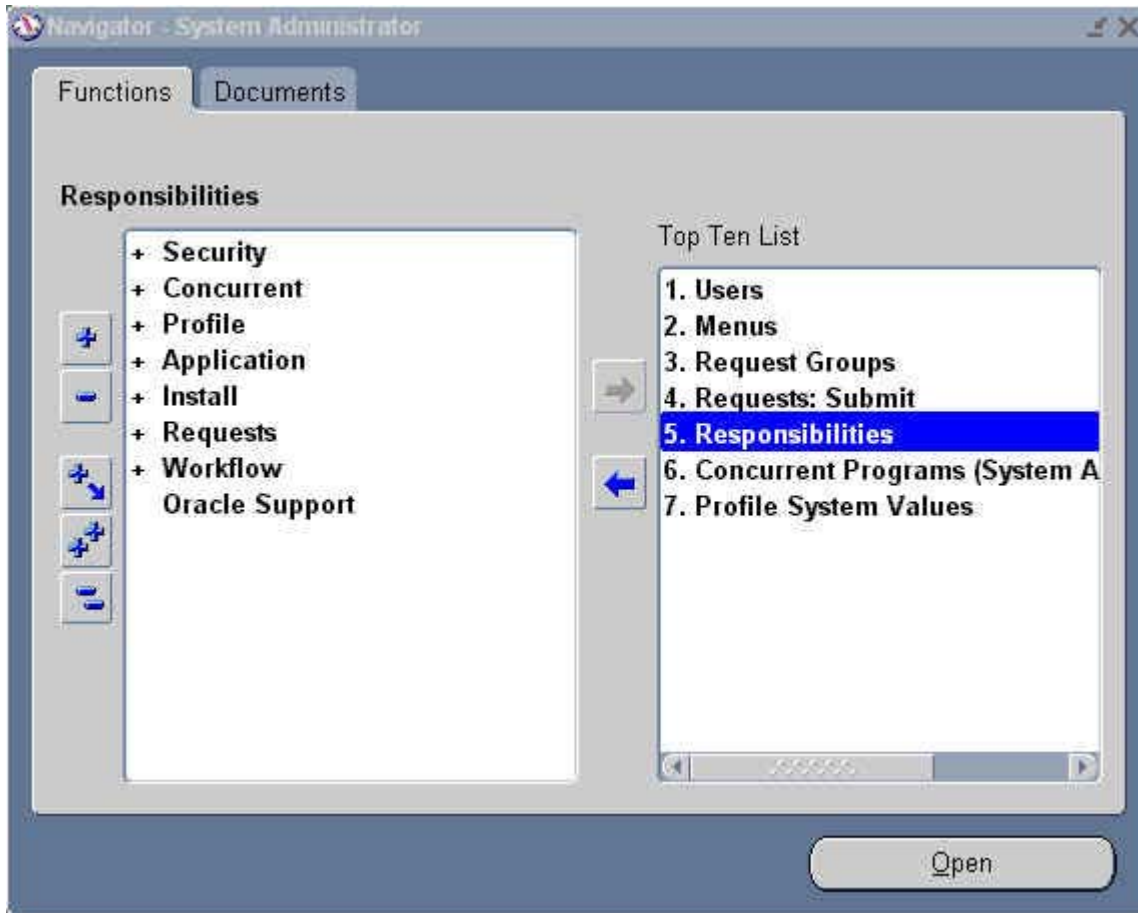
After connecting, a list of valid responsibility values assigned to the user name appears. Select the desired responsibility by single-clicking on the responsibility from the list of values.



Valid Responsibility Values List




NAVIGATION

Using the Navigator



Sample Navigator Form

To expand or collapse the navigation list:

1. Choose one of the following methods to expand an entry to its next sub-level:
 - Double-click on the entry.
 - Single-click on the entry and select the **Open** button.
 - Single-click on the entry and select the  button
2. Choose one of the following methods to collapse the entry:
 - Double-click on the entry.
 - Single-click on the entry and select the  button
3. To expand or collapse several entries at once, choose one of the following buttons:
 **Expand All Sub-Levels**—display all the sub-levels of the currently selected entry.


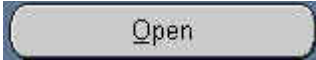


Expand All—display all the sub-levels of all expandable entries in the list.



Collapse All—collapse all currently expanded entries in the list.

To Open a Form

1. Optional: Click on the Menu - Tools. Select or deselect the  **Close Other Forms** checkbox.
2. Choose the desired form.
3. Double-click on it or select the  **Open** button.

Keyboard Shortcuts

- Use the **Tab** key to navigate through fields in a form.
- Use the **Return** key to activate the default button.
- Use the **Alt** key to invoke the menu, and then use the **Up Arrow** and **Down Arrow** keys to select a menu item.
- From the menu choose **Help→Keyboard Help...** to see a list of predefined shortcut keys as they are mapped to the keyboard. Common shortcut keys include (multiple keys that must be pressed at the same time are indicated with the “+”):













CTRL+L	List of Values
F11	Enter Query
CTRL+F11	Execute Query
F6	Clear Record
F8	Clear Form
SHIFT+F5	Duplicate Field
SHIFT+F6	Duplicate Record
CTRL+E	Edit Field
CTRL+↓	Insert Record
CTRL+S	Commit (Save)

- Use standard accelerators for cut (**CTRL+X**), copy (**CTRL+C**) and paste (**CTRL+V**).

USING THE TOOLBAR AND MENUS







File Menu and Associated Icons



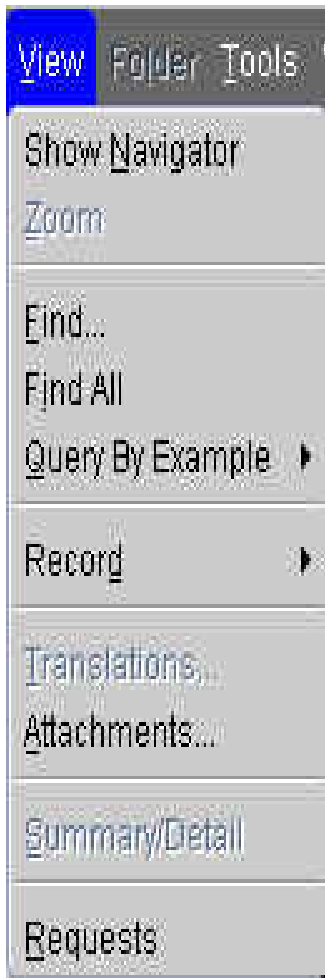
Icon	Explanation
	Add a new record
	Open current selection on navigator
	Save changes
	Save changes and display next record
	Updates the Process workflow in the Navigator by advancing to the Next step
	Export records to external source
	Creates an Icon in the Documents tab of the Navigator
	Exits the application and displays the Oracle Applications Logon window. <i>Not available in version 11i.</i>
	Closes all active windows and displays the Responsibility window.
	Print
	Close the current form
	Exit all windows and forms

Edit Menu and Associated Icons















Icon	Explanation
	Clear data just entered in current field
	Cut data in current field
	Copy data in current field
	Paste cut or copied data to the current field
	Duplicate record above or field above
	Clear record data
	Clear record, field, block or form
	Delete current record from database
	Select all records
	Deselect all selected records
	Edit current field
	Update password or user profiles

View Menu and Associated Icons





Icon	Explanation
	Displays the Navigator Window
	Invokes custom defined zooms
	Displays the find window to retrieve records
	Retrieves all records
	Search criteria in Enter, Run or Cancel modes for a Query by Example. Also, recovers previous search criteria and/or counts the number of records.
	Creates an Icon in the Documents tab of the Navigator
	Moves the cursor to either the first or last record.
	Displays the translations window
	Displays the Attachments window
	Switch between the summary and detail views
	Displays the request window

Folder Menu and Associated Icons


Folder Menu	Icon	Explanation
New...		Creates a new folder definition
Open...		Opens an existing folder definition
Save		Saves changes to the current folder definition
Save As...		Saves current folder definition to a new name
Delete...		Deletes an existing folder definitions
Show Field...		Displays a field that is currently hidden
Hide Field		Hides the current field
Move Right		Moves the current field to the right
Move Left		Moves the current field to the left
Move Up		Moves the current field up
Move Down		Moves the current field down
Widen Field		Increases the width of the current field
Shrink Field		Decreases the width of the current field
Change Prompt...		Changes the prompt for the current field
Autosize All...		Adjusts all field widths to completely show their data
Sort Data...		Specifies sort order for the first three fields
View Query...		Displays the query criteria for the current folder definition
Reset Query		Erase the current query criteria
Folder Tools		Display the folder tool palette


SUMMARY / DETAIL NAVIGATION

- Select the  button to navigate to an existing detail record.
- Select the  button to navigate to the detail window and create new record.

QUERY

Using Query Find

From the menu choose **Query→Find** or select the  button.


- If a list window appears, select the record and select the **OK**  button to retrieve the record into the current block.
- If a Find window appears, enter search criteria in the appropriate fields. From the menu choose **Find or Go→Next Block** to find any matching records.

Query-by-Example

1. From the menu choose **Query→Enter**.
2. Enter search criteria in any of the fields, using wildcard characters and query operators as necessary.
3. From the menu choose **Query→Run** to initiate the search or choose **Query→Cancel** to cancel the query.

DATA ENTRY

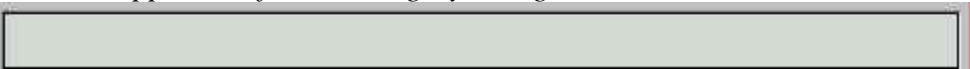
Display Field—*No bevel for view-only fields*

Name 

Enterable Field—*Inset bevel for entry fields*

Supplier Name 

Disabled Field—*Inapplicable fields have gray backgrounds*

Liability 

Insert / Replace

To replace text, highlight current text and enter new text or just start typing after tabbing into the field.

To insert text, place the cursor at the appropriate position in the field and enter the new text.

Cut / Copy / Paste

1. Select the data in the field. (Data is automatically selected and highlighted when tabbing into the field)
2. From the menu choose **Edit→Cut**, or press the keys **CTRL+X** to cut the selected data. From the menu choose **Edit→Copy**, or press the keys **CTRL+C** to copy the selected data. Note: Cut is like Copy, except Cut also removes the data from the field.
3. Move the cursor to another field, then from the menu choose **Edit→Paste**, or press the keys **CTRL+V** to paste the cut or copied data into the current field.

Clearing Data

To clear selected data from a field:

- From the menu choose **Edit→Clear Field**.

To clear a record of data:

- From the menu choose **Edit→Clear Record** or select the  button.

To clear data from the current block:


- From the menu choose **Edit→Clear Block**

To clear all data from a form:

- From the menu choose **Edit→Clear Form**

Creating and Deleting Records


To create a new record:

- From the menu choose **Edit→New Record** or select the  button to insert a new record after the existing record.
- Click on a blank record.
- Press the **Down Arrow** key to move to a blank record within a series of records.

To delete a record from the database:

- From the menu choose **Edit→Delete Record** or select the  button.

To save changes:

- From the menu choose **Action→Save** or select the  button.
- From the menu choose **Action→Save and Proceed** to save current changes and display the next record.

Duplicating Data


To copy a field value from the previous record:

1. Navigate to the target.
2. From the menu choose **Edit→Duplicate Field Above** to copy the field value from the previous record to the current record.

To copy all field values from the previous record:

1. Create a new record.
2. From the menu choose **Edit→Duplicate Record Above**.

Using LOV (List of Values)

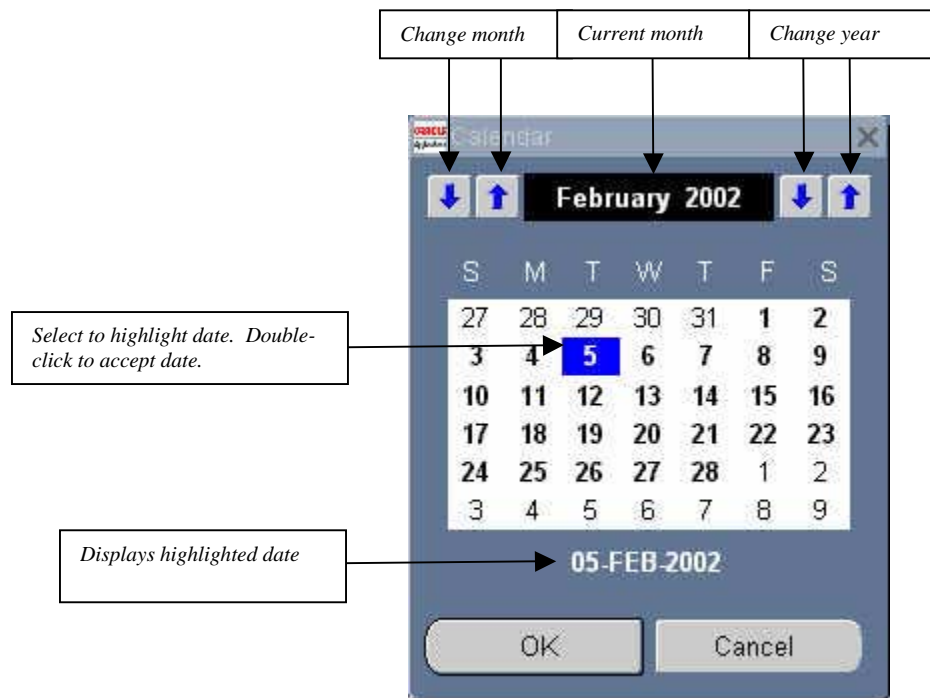
1. From the menu choose Edit→List of Values or select the  button to display a list of values. The LOV window automatically appears when an invalid value is entered.



Note: If a field is likely to contain many possible values, a “longlist” window appears. Use this window to reduce the number of entries displayed in the LOV by entering a partial value for the field.

2. Reduce the list entries shown with one of the following methods:
 - Click in the **List** field, type the first character(s) of a value to *autoreduce* the list to just those values in the first column.
 - Click in the **Find** field, enter search criteria, then select the **Find** button.
3. Choose the desired value with one of the following methods:
 - Double-click on the value.
 - Single-click on the value and then select the **OK** button.
 - Press the **Up Arrow** or **Down Arrow** key to select a value, and press the **Return** key.
 - *Autoreduce* the list to a single value.

Using the Calendar

1. While in a date field, from the menu choose **Edit→List of Value, Edit→Edit Field...** or select either the  or  buttons to display the Calendar window.



2. Use the month and year buttons   to select month and year.
3. Click on a day in the calendar to highlight a date. Days that are invalid are shown with a gray background.
4. To accept the selected date:
 - Select the **OK** button.
 - Double-click on the date.

Time fields appear on the calendar where they are required entry in the field. Time fields indicate the hour, minute and AM or PM.

FLEXFIELDS

Entering Data in Key Flexfields *(with Multiple Segments)*


- If the exact combination of segment values is known, enter the concatenated combination directly into the key flexfield.

Otherwise:


- From the menu choose **Edit→Edit Field** to open the flexfield window. Use List of Values on desired segments to display valid values.

Select the **OK** button to close the flexfield window or select the **Cancel** button to discard changes.

Searching Within Key Flexfields

1. From the flexfield window select the  button to display a Reduction Criteria window.
2. Enter values for known segments.
3. Select the **OK** button to query.
4. Choose an existing combination from the list or select the **Cancel** button.

Entering Data in Descriptive Flexfields

1. Move the cursor into a descriptive flexfield, indicated by , which causes the flexfield window to display.
2. Enter a value in required segments. Use List of Values where available.
3. Select the **OK** button to close the flexfield window or select the **Cancel** button to discard changes.

REQUESTS

Submit a Request

1. Navigate to the Submit Requests form. The Submit a New Request form pops up.
2. Select request type and click the **OK** button.
 - **Single Request** to submit an individual request.
 - **Request Set** to submit a pre-defined set of requests.
3. Enter or select the Request Name from the List of Values.
4. Enter additional parameters if required. Select the **OK** button to close the parameters window.
5. Click the **Schedule** button. Choose how to run the request or select a pre-defined schedule. Select the **OK** button.
6. Select the **Options** button. Specify the Printer and Print Style. To view output online, select the **Save Output** check box. Select the **OK** button.

7. Select the **Submit Request** button to submit the request.

Monitor and View Requests

Review requests that have been submitted, review progress toward completion and review results online:

1. From the menu choose **View → Requests** or use the Navigator to view concurrent requests.
2. Enter search criteria in the Find form and click the **Find** button.
3. Select the **Refresh Data** button to update the status of the request.
4. Single-click on a request.
5. Select the **View Output** button to see the request report (if applicable) or the **View Log** button to see the request log file.

FOLDERS


A folder block is a special block whose field and record layout can be customized, saved and used as a default folder.

Folder blocks are indicated by an **Open Folder** button appearing in the upper left corner of the block.




The **Folder Tools** button and **Folder** menu option will also be enabled.











To open the **Folder Tools** palette select the  button.

To open an existing folder:


1. From the menu choose **Folder→Open...** or select the  button from the palette.
2. Select the desired folder.
3. Select the **OK** button.

To customize the appearance of a folder block, use the palette to:

- Select fields to be displayed  or hidden  in the block.
- Widen or shrink the   width of the displayed field and
- Change the order in which the fields appear by selecting them and moving them.  
- To sort a column click on the prompt and the data will be sorted accordingly. Also, choose **Folder→Sort Data** and select the criteria desired.
- These settings determine how the folder sorts the records it displays. The folder applies these settings from left to right when it retrieves and sorts the records.

- To change the sort order fields, move the desired fields into one of the first three positions using the buttons  


To save a folder:

1. From the menu choose **Folder→Save As...** to create a new folder (select the  button or from the menu choose **Folder→Save** to save changes to an existing folder).
2. Enter a name for the folder.
3. Select the **Open as Default** checkbox to automatically open the folder upon entering the form.
4. Select the **Public** checkbox to allow other users to use the folder definition. If **Public** is not selected, then only the user who created the folder can use it.
5. Select the **OK** button.

To define and save query criteria for a folder:

1. Run the desired query, either by using Query Find or query-by-example.
2. From the menu choose **Folder→Save As...**
3. Enter a name for the folder.
4. Select Always, Never, or Ask Each Time from the Autoquery Option Group. Select:
 - Always to perform the query automatically upon opening the folder.
 - Never to save the query with the folder, but not automatically run it upon opening the folder.
 - Ask Each Time to be prompted upon opening the folder to perform the query.
6. Select the **OK** button to save the query with the folder.

To delete a folder:

1. From the menu choose **Folder→Delete...** or select the  button.
2. Select the folder to be deleted.
3. Select the **OK** button.